



U.S. Department of Education

***Title III, Part B, Historically Black Graduate Institutions (HBGI)
Program***

Interim Performance Report for 1st Year HBGI Grantees

Ed Form IPR-BG1

Expiration date: 01/31/2003



U.S. Department of Education

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Introduction Letter

May 6, 2002

Dear Title III-B Project Director:

I hope that your grant activities are going well. I am writing to remind you that your institution's first performance report of the fiscal year is due shortly for your development grant under the Strengthening Historically Black Colleges and Universities Program, authorized by Title III, Part B, Section 326, of the Higher Education Act of 1965, as amended (HEA).

As you know, we are implementing a new performance reporting system wherein the single Grant Performance Report (which was used in previous years) will be replaced with two smaller reports. The first component is an Interim Performance Report (IPR), which concentrates on grant management and will provide us with a brief, yet substantive, evaluation of your mid-year progress.

The second component is the Annual Performance Report, which will be due after the fiscal year. The annual report will focus on the outcome of your project objectives and the Government Performance and Results Act (GPRA) indicators. Both reports are designed to streamline the reporting process, making it less burdensome and above all, more useful. Coupled together, they will more effectively demonstrate the merits of the Title III-B Programs, and enable us to formulate responsive solutions to the difficulties that accompany your project.

In the IPR you are required to include information that demonstrates your institution's substantial progress toward meeting the objectives of the activities in your project. We understand that because this is the first year of your five-year development grant you will be only reporting on your progress from October 1, 2001 through March 31, 2002. Also, we recognize that our first-year grantees face significantly different challenges than in subsequent years; therefore the focus of this IPR will be on your start-up efforts. The substantial progress requirement is cited in section 75.253(2)(i) of the Education



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Department General Administrative Regulations (EDGAR). Notice of non-competitive continuation awards will be announced by August 19, 2002.

Please be aware that section 75.253 of EDGAR also states that non-competitive continuation awards are made if Congress has appropriated sufficient funds under the program. The program was appropriated sufficient funds to allow you to submit a FY 2003 budget. This amount appears as the FY 2003 funding level in block #6 of your Grant Award Notification.

To ensure consideration for funding, the completed performance report must be postmarked no later than **June 19, 2002**. Please mail the original and one copy to:

**U.S. Department of Education
Higher Education Programs
Title III-B HBGI Program
ATTN: Interim Performance Report
1990 K Street, NW, 6th Floor
Washington D.C. 20006-8501**

If you have any questions regarding the completion of the IPR, please contact your program officer directly or call 202-502-7777.

Sincerely,

A handwritten signature in cursive script, appearing to read "Margarita Benitez".

Margarita Benitez

Director

Institutional Development and Undergraduate Education Services



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Instructions for the Interim Performance Report

Purpose

First year recipients of five-year formula Title III-B grants must submit an Interim Performance Report (IPR) to receive a non-competing continuation award for their second year of funding. The information obtained from the IPR should demonstrate that substantial progress has been made towards meeting the project objectives outlined in your Title III-B Grant Application. Additional information may be found in Sections 74.51, 75.118, 75.253 and 75.590 of the Education Department General Administrative Regulations (EDGAR).

General Instructions

- Completion of the IPR is required for recipients of five-year development grants and will be completed in addition to the Annual Performance Report, which will be distributed later in the year.
- The word limits refer to the maximum amount of text that will be evaluated—if you need less space to respond, by all means do not feel compelled to meet the maximum word limits. Feel free to use bullets, tables, or other styles to clearly communicate your responses.
- Information should be reported only for the first six-months of your first year of funding—October 1, 2001 through March 31, 2002, except where projections are asked for.
- Narrative responses should be double-spaced with a 12- point font.
- The completed IPR must be postmarked no later than June 19, 2002 of your first year of funding. Please mail the original and one copy to:

**U.S. Department of Education
Higher Education Programs
Title III-B HBGI Program
ATTN: Interim Performance Report
1990 K St., NW, 6th Floor
Washington, D.C. 20006-8501**



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Part I: Cover Sheet

1. Performance Reporting Period

This is the first six months of your grant. Information requested in Parts II, III & IV of the IPR should refer to this period.

2. PR/Award Number

You can find your PR/Award Number on your Grant Award Notification. Note that the Title III-B prefix of the PR/Award Number is already provided, so please fill in the last eight (8) numbers of the PR/Award Number.

Recipient Institution Information

This is the information for the entity that receives federal dollars, as stated in the Grant Award Notification. The recipient is usually an Institution of Higher Education, but due to certain legal designations, other entities may be listed. For example, the recipient of the grant funds could be a Foundation, Board of Directors, or District Office.

3. Title III-B Financial Officer Contact

Please provide the contact information for the Financial Officer who works with the HBGI project at your institution. If this information is unavailable or if you do not know the Financial Officer, please give a brief explanation in the space provided in question # 16 of Part III.

4. Descriptive Title of Project

This is the title of your unique project, not the Title III-B Program. It can be found on block #12 of your Application for Federal Assistance (form ED 424).

5. Contact Information for Project Director

Please update the contact information for the Project Director. If you need to inform the office of a change in your Project Director, please mark (X) the box and submit the resume of the current director if the appointment has not been approved by the program office. For "Project Title," fill in the director's title within the HBGI project, not the institution's hierarchy.

6. Institution and President/CEO Information

For "institution," please enter the name of the University or College that is the subject of the grant award and the project activities. Please enter the contact information for the President or CEO of your institution.

7. Authorized Representatives



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The Project Director or Coordinator and a representative from your institution should both sign the Interim Performance Report. The institution representative should be someone with institution-wide authority, such as a dean, provost or President.

Part II: Executive Summary

In narrative form, please describe the progress of your project implementation during the reporting period. This is an opportunity for you to communicate successes and difficulties in implementing your project (consider each of your project objectives and activities), and to report substantial changes that have occurred during the reporting period. For both of the topics, you should comment upon any difficulties your project has encountered, a course of action to resolve these difficulties, and a timetable for resolution. Also use this opportunity to comment upon any anticipated changes to your project. Please limit your response to a maximum of one page. We recommend that you complete this summary last and keep in mind that this narrative should be in addition to your explanations provided in the questionnaire (Part III) and in the budget report (Part IV).

Part III: HBGI Questionnaire

Please answer the questions by marking the appropriate box (X). When applicable, additional space has been provided for you to provide explanations, or to inform the Program Office of any additional information.

Part IV: Interim Budget Report

The budget report is intended to provide a brief overview of your expenditures and expected obligations. Please report the amount of your award for fiscal year (FY) 2002 in the space provided and list expenditures in the appropriate category. The expenditures should refer to federal dollars only; non-federal funds that were spent during the reporting period should not be included in the table. The single budget report is a sum of all project activities, rather than an activity-by-activity breakdown. *Please round to the nearest dollar and do not report cents.* Be sure to review the budget portion carefully, as mathematical errors will result in substantial processing delays. Once the chart is complete, feel free to use the space provided to comment upon specific budget



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issues. If necessary, incorporate additional budget commentary into the narrative portion of the report (Part II).

Interim Budget Report Definitions:

Actual Budget (10/01/2001-09/30/2002): The FY 2002 budget you outlined in your grant application for each of the budget categories. If the proposed budget from your application was reduced or altered by the Program Office, please use your adjusted (or revised) budget. The total costs (Row 10) should match the FY award amount from your most recent Grant Award Notification.

Expenditures (10/01/2001-03/31/2002): The amount of expenses incurred during the reporting period.

Projected expenditures (04/01/2002-09/30/2002): The projected amount that will be spent during the remainder of the fiscal year.

Carryover Balance (09/30/2002): The estimated funds that will not be spent by the end of the current fiscal year. In the budget narrative, please explain why you anticipate having carryover funds.

Next Year's Projected Budget (10/01/2002-09/30/2003): The budget you have planned for the next FY. Unless you have been notified of your actual budget for the next FY, please enter a reasonable approximation of your next FY budget based on projected Program increases.

Personnel: The total amount spent on staff salaries, which are not part of "fringe benefits." Do not include consultants or other personnel who are not entitled to 'fringe benefits.' Include those costs under the "Other" category.

Fringe Benefits: Enter the percentage rate at which your institution calculates fringe benefits. Also enter the total amount used for fringe benefits, converted from your institution's percentage rate into a dollar amount.

Travel: Total amount spent on transportation and per diem expenses during travel that is necessary and related to achieving the objectives of your project. Do not include freight costs or consultants' travel expenses. Include these costs in the "Other" category.

Equipment: Total purchasing cost of all tangible personal property for both fixed and movable items. Include property having an acquisition cost of \$5,000 or more per unit.



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Do not include the cost for renting equipment. Include these costs in the “Other” category.

Supplies: Total purchasing cost of all tangible personal property having an acquisition value of less than \$5,000 per unit.

Contractual: The total cost of contractual agreements with another institution of higher education, organization or business. Do not include costs for consultants. Include these costs in the “Other” category.

Construction: Total costs associated with approved construction projects (including renovation costs).

Other: Include all other direct costs not covered by budget categories #1-7, such as training stipends, communications, freight costs (not covered in vendor purchase price), equipment rental, computer use charges, summer employment stipends, consultant costs, etc.

Endowment Monies: Total sum of federal HBGI dollars designated as endowment dollars.

Total Costs: Enter the sum of all costs (Rows 1-9) for the budget period.

Part V: Customer Service Questionnaire

Please answer the questions and provide feedback on how the Program Office can better serve grantees. Feel free to make any comments, criticisms or suggestions as this section of the IPR will be processed separately to ensure anonymity. When you have completed Part V, please seal the questionnaire in a separate envelope marked **Customer Service Questionnaire**, and mail it with the IPR. When the Program Office receives your IPR, the customer service questionnaire will be removed from the IPR. Please note that the responses will have no bearing on funding decisions.

Paperwork Burden Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is 1840-0765. The time required to complete this information collection is estimated to average 6 hours per response, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collection. If you have any comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: U.S. Department of Education, Washington, D.C. 20202-4651. If you have comments or concerns regarding the status of your individual submission of this form, write directly to: U.S. Department of Education, Attn: HBGI Program Office, 1990 K St. NW, Washington, D.C. 20006-8501.



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Part I: Cover Sheet

1. *Performance Reporting Period:*

October 1, 2001—March 31, 2002

2. *PR/Award No.* (Block 5 on Grant Award Notification)

P031B _____

3. *Recipient Institution Information*

Name: _____

Address: _____

City: _____ State: _____

Zip+4: _____

E-Mail _____

4. *Title III-B Financial Officer Contact*

Name: _____

Title: _____

Tel. # _____

Fax # _____

E-mail: _____

5. *Descriptive Title of Project*

6. *Contact Information for Project Director*

Name: _____

Project Title: _____

Address: _____

City _____ State _____ Zip _____

Tel. #: _____ Fax #: _____

E-mail Address: _____

☐ Mark here if the Director has changed since the grant application was submitted and send current resume if necessary.

7. *Institution and President Information*

Institution Name _____

President/CEO Name _____

Address _____

City _____ State _____ Zip _____

President's Tel.# _____

President's E-mail: _____

8. *Authorized Representatives*

To the best of my knowledge and belief, all data in this performance report are true and correct.

Project Director Name (Typed or Printed)

Institution Representative (Typed or Printed)

Signature

Signature

Date _____



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Part II: Executive Summary

Following the guidelines from the instructions, please limit your narrative response to a maximum of one page.



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Part III: HBGI Questionnaire

Grant Management:

Additional Instructions

1) Have you read your: a.) Comments from your Program Officer? b.) Education Department General Administrative Regulations (EDGAR)?	Y <input type="checkbox"/> <input type="checkbox"/>	N <input type="checkbox"/> <input type="checkbox"/>	Please mark (X) the appropriate box for each question. If you need a copy sent to you, mark the appropriate box: <input type="checkbox"/> EDGAR <input type="checkbox"/> PO Comments
2.) Were you involved in the development and writing of your Title III-B application?	Y <input type="checkbox"/>	N <input type="checkbox"/>	If no, have you thoroughly reviewed your Title III-B application? <input type="checkbox"/> Yes <input type="checkbox"/> No
3.) Have you hired all of the Key Personnel outlined in your grant application? (Key Personnel = Project Director & Activity Coordinators) Name_____ Project Title_____ Name_____ Project Title_____ Name_____ Project Title_____ Name_____ Project Title_____ Name_____ Project Title_____ Name_____ Project Title_____	Y <input type="checkbox"/>	N <input type="checkbox"/>	Please provide the names and titles of all key personnel that have been hired. If any positions remain unfilled, please briefly (50 words or less) identify major problems and when the positions are likely to be filled.



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4.) Have you hired all of the activity staff on the schedule outlined in your grant application? (Staff other than Key Personnel)

Y
☐

N
☐

If any positions remain unfilled, please briefly (50 words or less) identify major problems and when the positions are likely to be filled.

Name_____ Project Title_____

Name_____ Project Title_____

Name_____ Project Title_____

Name_____ Project Title_____

Name_____ Project Title_____

Name_____ Project Title_____

5.) Have you submitted the resumes for all Key Personnel to the Program Office, if the resumes were not in your Grant Application?

Y
☐

N
☐

If No, please send resumes with the Interim Report.

6.) Does your institution have a Title III-B Advisory Committee / Steering Committee as part of your project management plan?

Y
☐

N
☐

If Yes, please answer question # 6a & 6b.



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6a.) How satisfied are you with the effectiveness of the Advisory / Steering Committee?

Y
☐

N
☐

Please use the space provided (50 words or less) to explain how the Advisory Committee has been effective or ineffective, including steps for improving the efforts of the committee.

| Very Dissatisfied | | Dissatisfied | | Satisfied | | Very Satisfied | | No opinion |

☐☐☐☐☐

6b.) How often has your Advisory / Steering Committee met during the reporting period?

| Never | Once | | Twice | | Three to four times | Five times or more |

☐☐☐☐☐

7.) Have you secured office space as described in your application for the management of your HBGI project, including space for your fiscal and programmatic records?

Y
☐

N
☐

If No, please describe what steps you are taking to acquire sufficient space (50 words or less). If you have acquired space that differs from what you described in your application, please explain.



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8.) Have you secured space as described in your application for the implementation of your Title III-B activities?	Y <input type="checkbox"/>	N <input type="checkbox"/>	If No, please describe what steps you are taking to acquire sufficient space (50 words or less). If you have acquired space that differs from what you described in your application, please explain.
9.) Has the Project Director attended the most recent Title III-B Directors' meeting? Name of Attendee: _____ Location of Meeting: _____ Date: _____	Y <input type="checkbox"/>	N <input type="checkbox"/>	Please note date and location of meeting attended.
10.) Has anyone else from your institution attended a Title III B Directors' meeting? Name of Attendee: _____ <input type="checkbox"/> Financial Officer <input type="checkbox"/> President/CEO <input type="checkbox"/> Activity Director <input type="checkbox"/> other: _____ Location of Meeting: _____ Date: _____	Y <input type="checkbox"/>	N <input type="checkbox"/>	Please note date and location of meeting attended.
11.) Have you created, are you creating, or are you updating, a HBGI Policy and Procedure Manual? Date of Completion: _____ Expected date of Completion: _____ Date of update: _____	Y <input type="checkbox"/>	N <input type="checkbox"/>	A Policy and Procedure manual might include Federal grant guidelines and forms, your institutional grant management policies, common administrative procedures, and important campus contact information.



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12.) Are you meeting all your activity(s) objectives as outlined in your Implementation Strategy and Timetable Form?

Y
☐

N
☐

In 600 words or less (you may use the space provided or attach separate pages), briefly summarize your progress and what steps you are taking to overcome major obstacles to reaching this year's objectives. If applicable, please explain why activities slated for this year will be moved to a following year. When providing quantifiable evidence, please briefly restate the baseline data and your objectives.



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13.) Have you made or do you plan to make adjustments to the scope or objectives of your project?

Y
☐

N
☐

In 300 words or less, briefly summarize the changes you have made, or will be making to the scope or objectives of your project. This should include changes approved by the Program Office during the Reporting Period.



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14.) Do you foresee any difficulties in implementing your evaluation plan to measure the success of your project?

Y

☐

NA

☐

N

☐

In 300 words or less, please describe the challenges that you face with your evaluation plan, and your plan to overcome these challenges. Also describe your progress towards implementing an evaluation plan, and note if an external evaluator will be used.



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Budget Management:

15.) Do you know the Financial Officer in charge of Title III-B funds?	Y <input type="checkbox"/>	N <input type="checkbox"/>	Please provide the contact information for the Financial Officer on the cover sheet of this report.
16.) Have you met with the Financial Officer to discuss record keeping and communication issues related to HBGI procedures?	Y <input type="checkbox"/>	N <input type="checkbox"/>	Please use the space provided to discuss any obstacles impeding your communication with the Financial Officer.
16a.) Have you and your Financial Officer discussed the post-award regulations governing your grant award?	Y <input type="checkbox"/>	N <input type="checkbox"/>	Regulations can be found in CFR/EDGAR Sections 74-77, 79, 80-82, 85, 86, 97-99.
16b.) Have you and your Financial Officer discussed the implications of the "Expanded Authorities" regulations that govern your grant budget?	Y <input type="checkbox"/>	N <input type="checkbox"/>	Information regarding Expanded Authorities can be found at http://www.ed.gov/offices/OCFO/grants/gposbul/gpos19.html .
16c.) Is your Financial Officer able to use the GAPS system?	Y <input type="checkbox"/>	N <input type="checkbox"/>	Questions regarding GAPS can be directed to 1-888-336-8930 and answers to FAQ's are located at www.ed.gov/offices/OCFO/faq.html
17.) When you received your grant award, was your budget reduced from your requested funding level due to unallowable costs?	Y <input type="checkbox"/>	N <input type="checkbox"/>	If Yes, please answer question #18.
18.) Have you submitted a budget adjustment to the Program Office?	Y <input type="checkbox"/>	N <input type="checkbox"/>	If No, please submit a budget adjustment using a blank budget.
19.) Are you using a portion of your grant award for establishing or improving an endowment fund?	Y <input type="checkbox"/>	N <input type="checkbox"/>	If Yes, please answer questions # 19a & 19b.



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19a.) Have you and your Financial Officer discussed the regulations (federal and institutional) governing your endowment fund?	Y	N	For more information on federal guidelines, please see the Title III-B program regulations (34 Code of Federal Regulations, Part 609).
	<input type="checkbox"/>	<input type="checkbox"/>	
19b.) Has your institution raised any portion of matching non-federal funds for your endowment?	Y	N	Please provide additional information (in the space provided or in Part IV) regarding your endowment fund, including steps for overcoming obstacles in raising non-federal funds.
	<input type="checkbox"/>	<input type="checkbox"/>	



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Part IV: Interim Program Budget Report

Award Amount for Current Fiscal Year 2002: _____

PR/Award Number: P031B

Budget Categories	Actual Budget 10/01/2001 – 9/30/2002	Expenditures 10/01/2001 – 3/31/2002	Projected Expenditures 4/01/2002 – 9/30/2002	Carryover Balance 9/30/2002	Next Year's Projected Budget 10/01/2002 – 9/30/2003
1.) Personnel					
1.) Fringe Benefits ____ %					
3.) Travel					
4.) Equipment					
5.) Supplies					
6.) Contractual					
7.) Construction					
8.) Other					
9.) Endowment Monies					
10.) Total Costs (Rows 1-9)					



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Part IV: Interim Budget Report (Continued)

In 300 words or less, please provide any additional information about your budget during the reporting period. Suggested topics that you could address include: the reasons you are not expending funds at an expected rate; significant changes to your budget resulting from modifications of project activities; and any anticipated changes to your budget for the remainder of the FY.



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Part V: Customer Service Questionnaire

Please seal Part V of the IPR in a separate envelope and send it with your IPR to the Program

Office. Please note that responses are anonymous and will have no bearing on funding decisions.

1) How helpful were the Program Officer comments about your application, in implementing and managing your project?

Please describe how the Program Officer comments were helpful, or how they could be improved.

| Very Unhelpful | | Unhelpful | | Helpful | | Very Helpful | | No opinion |

☐☐☐☐☐

2) How often have you visited the Title III-B Web Site (www.ed.gov/offices/OPE/HEP/ides/title3b.html) during the reporting period?

Please make any suggestions on improving the web site's content and format.

| Never | 1-5 times | | 6-10 times | 11-15 times | 15+ times |

☐☐☐☐☐

3) How many times have you communicated (voice, e-mail, and mail) with the Title III-B Program Office?

| Never | 1-5 times | | 6-10 times | 11-15 times | 15+ times |

☐☐☐☐☐



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3a.) Which was the most effective way to contact the Program Office?

| E-mail | | Telephone | | US Mail | | Fax | | Other (please specify) |

☐ ☐ ☐ ☐ ☐

3b.) How satisfied were you with the knowledge of the Program Officers regarding your inquiry?

| Very Dissatisfied | | Dissatisfied | | Satisfied | | Very Satisfied | | No opinion |

☐ ☐ ☐ ☐ ☐

3c.) How satisfied were you with the responsiveness of the Program Office?

| Very Dissatisfied | | Dissatisfied | | Satisfied | | Very Satisfied | | No opinion |

☐ ☐ ☐ ☐ ☐

3d.) How satisfied were you with the courteousness of the Program Office?

| Very Dissatisfied | | Dissatisfied | | Satisfied | | Very Satisfied | | No opinion |

☐ ☐ ☐ ☐ ☐

4) How satisfied were you with the overall customer service that the Title III-B Program Office has provided?

| Very Dissatisfied | | Dissatisfied | | Satisfied | | Very Satisfied | | No opinion |

☐ ☐ ☐ ☐ ☐

Please make any suggestions as to how the Program Office can improve any facet of its service. Feel free to add an additional page if necessary.



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5) How many times have you communicated (voice, e-mail, and mail) with your Department of Education Area Representative?

| Never | 1-5 times | 6-10 times | 11-15 times | 15+ times |

☐ ☐ ☐ ☐ ☐

5a.) Which was the most effective way to contact your Area Representative?

| E-mail | Telephone | U.S. Mail | Fax | Other (please specify) |

☐ ☐ ☐ ☐ ☐

5b.) How satisfied were you with the knowledge of the Area Representative regarding your inquiry?

| Very Dissatisfied | Dissatisfied | Satisfied | Very Satisfied | No opinion |

☐ ☐ ☐ ☐ ☐

5c.) How satisfied were you with the responsiveness of the Area Representative?

| Very Dissatisfied | Dissatisfied | Satisfied | Very Satisfied | No opinion |

☐ ☐ ☐ ☐ ☐

5d.) How satisfied were you with the courteousness of the Area Representative?

| Very Dissatisfied | Dissatisfied | Satisfied | Very Satisfied | No opinion |

☐ ☐ ☐ ☐ ☐

6.) How satisfied are you with the overall customer service that the Area Representatives have provided?

| Very Dissatisfied | Dissatisfied | Satisfied | Very Satisfied | No opinion |

☐ ☐ ☐ ☐ ☐

Please make any suggestions as to how the Area Representatives can improve any facet of their service. Feel free to add an additional page if necessary.